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Wealthtech Weekly

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By Rob Burgess
Reporter

My phone's step counter says I have clocked over 30 miles since I touched down Saturday for Future Proof in Huntington Beach, California. My legs are a bit sore, but it's been worth it. Be sure to read about Samantha Russell's guide to getting noticed in AI search summaries, and Michael Kitces' latest advisor tech findings.

Did you also attend Future Proof? If so, what were your highlights? Let me know — robert.burgess@arizent.com.

I hope you'll check out these articles, along with the rest of this week's stories.

As always, thank you for reading. Talk to you next Thursday!

Connect with Rob:

TOP STORIES

TECHNOLOGY

Tech serving higher-value clients beats expanding capacity: Kitces

It is easier to double the average client, or average up, than it is to double the number of current-average clients served, or efficiency up.

- **How advisors can get noticed in a no-click search world**
  Samantha Russell, chief evangelist of FMG, outlined several strategies to help advisors get noticed during her session Sunday at Future Proof.

- **The 'never settle' approach to RIA tech: Show Me Your Stack**
  Christopher Haigh, founder and CEO of Iconoclastic Capital, isn't afraid to speak his mind — or to change his burgeoning firm's tech stack when necessary.
- **As SEC launches AI Task Force, here's what advisors should know**
  The technology can sift through large data sets at a rapid clip, which means advisors need to be proactive about documentation, self-examination and implementation of AI as infrastructure.
- **How AI is disrupting the first rung of the advisor career ladder**
  Though one study recently found that 78% of hiring managers said they expect AI use will lead to layoffs of recent graduates, advisors say plenty of on-ramps into wealth management will remain — they just might not look the same.

Read the latest in Wealthtech

Michael Kitces joins ADVISE AI 2025 PLUS registration is OPEN!

Register today for the industry's can't-miss event.

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